

ETPS

TRAINING

Eastern Tropical Pacific Seascape Training

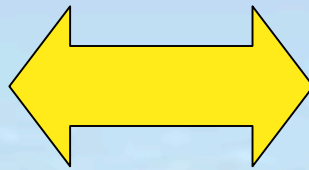
Module 1: MANAGEMENT PLANNING Part 1



Setting the Stage

Management process

- Planning
- Organizing
- Staffing
- Directing
- Controlling functions of management



Support for Management

- Information
- Communication
- Responsibility
- Authority systems

Management Planning

Activity: Please write down your own understanding of management planning on a post-it note. Paste it on the board.

Overview

- **Purpose and Need for Management Planning**
- **Strategic Planning and Evaluation**
- **Case studies**



Workshop Goal

Marine Protected Area (MPA) managers and staff have the tools and information to support the design and develop measurable sustainable tourism plans at both site and regional level.



Objectives

- Discuss the roles and value of various kinds of plans
- Describe the drivers, baselines, and niche of sustainable tourism program
- Work through a planning process at the project and site scale
- Select appropriate performance measures based on goals and objectives
- Identify stakeholder participation mechanisms and discuss level of involvement
- List tasks that need additional effort

Marine Protected Area Management Framework

Subject plans

**Stakeholder
involvement
guidelines**

**Site
management
plan outlines**

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graph TD; A[Subject plans] --> D[PLANNING DOCUMENTS THAT GUIDE EFFECTIVE MANAGEMENT AND USE OF MARINE PROTECTED AREAS]; B[Stakeholder involvement guidelines] --> D; C[Site management plan outlines] --> D;
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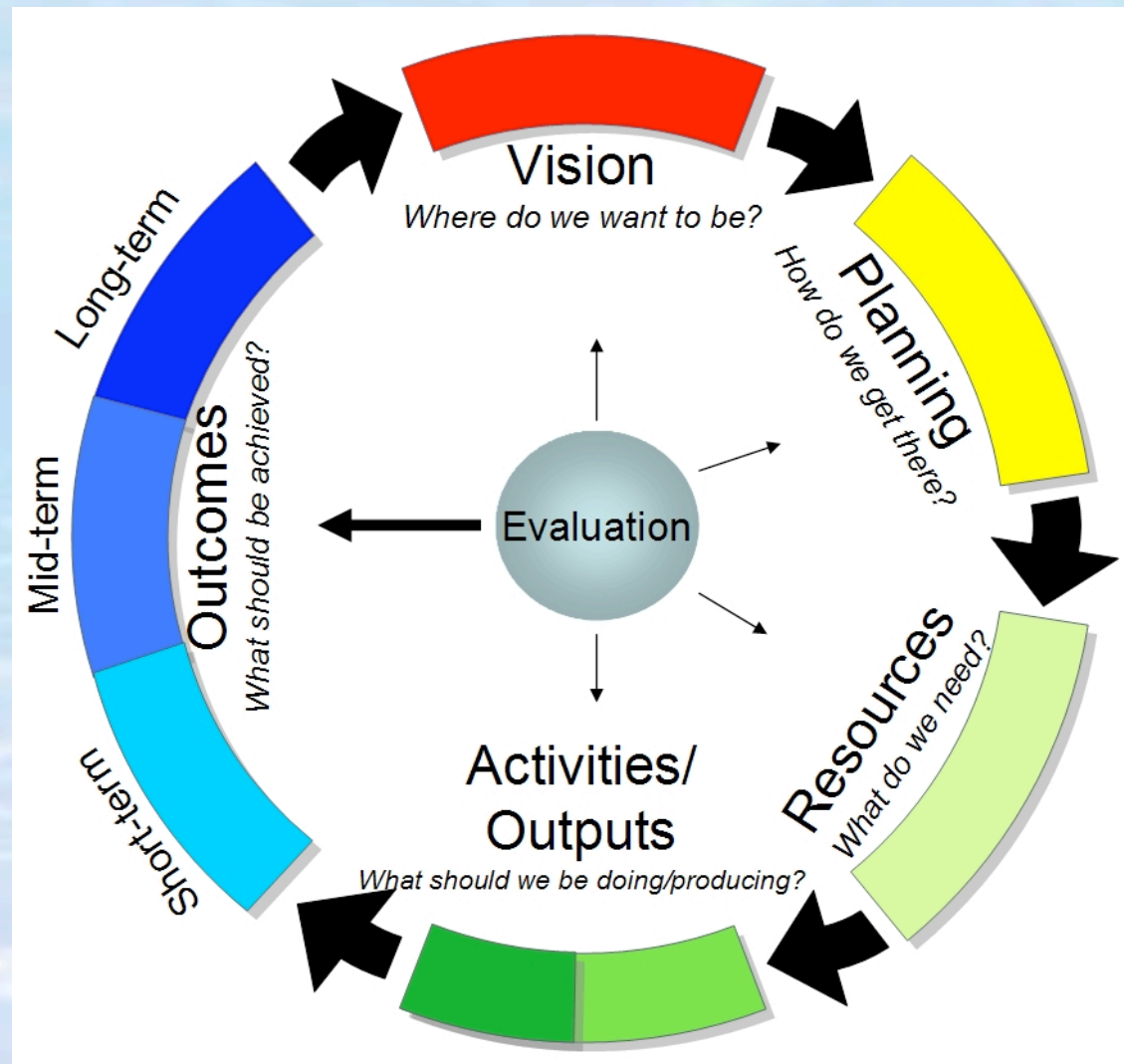
**PLANNING DOCUMENTS
THAT GUIDE EFFECTIVE
MANAGEMENT AND
USE OF MARINE
PROTECTED AREAS**

Successful MPAs

**Is “your” MPA
successful?**

How do you know?

Planning for Success



Discussion: Are You Being Effective?

- What are your drivers?
- What are your goals?
- How do you monitor progress towards goals?



Strategic Planning

A disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it, with a focus on the future.

What is Strategic Planning?

Strategic:

Response preparation

Planning:

Setting goals and an
approach to achieve them



Strategic Planning...

- Is the highest order of planning
- Is broad and long-term
- Is ongoing
- Must involve stakeholders
- Should incorporate monitoring and evaluation
- Helps to identify action areas

Strategic Planning does *NOT*

- Attempt to give detailed objectives
- Provide step-by-step description
- Make future decisions
- Always flow smoothly

Planning Scale

- **Range of scales**
- **All plans share the fundamental elements of planning**
- **At each scale, the purpose and scope differ**
- **Planning levels should be linked**
- **Similar styles of localized plans**

Planning Scale



- System
- Region
- Site



System Plans

Focus on

- Developing planning frameworks
- Articulating broad goals and objectives

Result in

- Strategic planning
- Requirements for lower-level planning

Site Plans

- Follow strategic guidance
- Address site-specific issues
- Contain detailed management actions
- Prioritize issues
- Are updated periodically

Regional Plans

- Apply to multiple sites
- Are strategic and specific
- Address common site-specific issues



Subject Plans

- One or a limited number of subjects
- A range of scales – site to system
- Limit scope of stakeholder involvement
- Examples
 - Resource management plans
 - Industry sector plans
 - Stakeholder process

System Plan Outline

- ☐ **Executive Summary**
- ☐ **Current and Emerging Issues**
- ☐ **Background**
 - Authority
 - Program Description
- ☐ **Management Strategies**
 - Goals and Mission
 - Biophysical
 - Socio-economic
 - Governance
 - Information Gaps
 - Stakeholder Involvement

Site Plan Outline

- ☐ **Site Goals**
- ☐ **Current and Emerging Issues**
- ☐ **Quantifiable management strategies & objectives**
 - Monitoring
 - Education and outreach
 - Access and use
 - Restoration
 - Stakeholder engagement (volunteers)
 - Land acquisition priorities
- ☐ **Background**
- ☐ **Appendix**

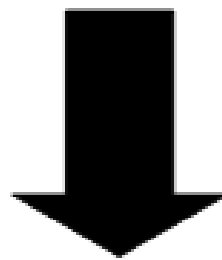
Examples of Subject Plans

- ☐ **Scientific Research**
- ☐ **Mapping**
- ☐ **Natural Resource Monitoring**
- ☐ **Natural Resource Restoration**
- ☐ **Environmental Education and Outreach
(includes volunteering)**
- ☐ **Administration**

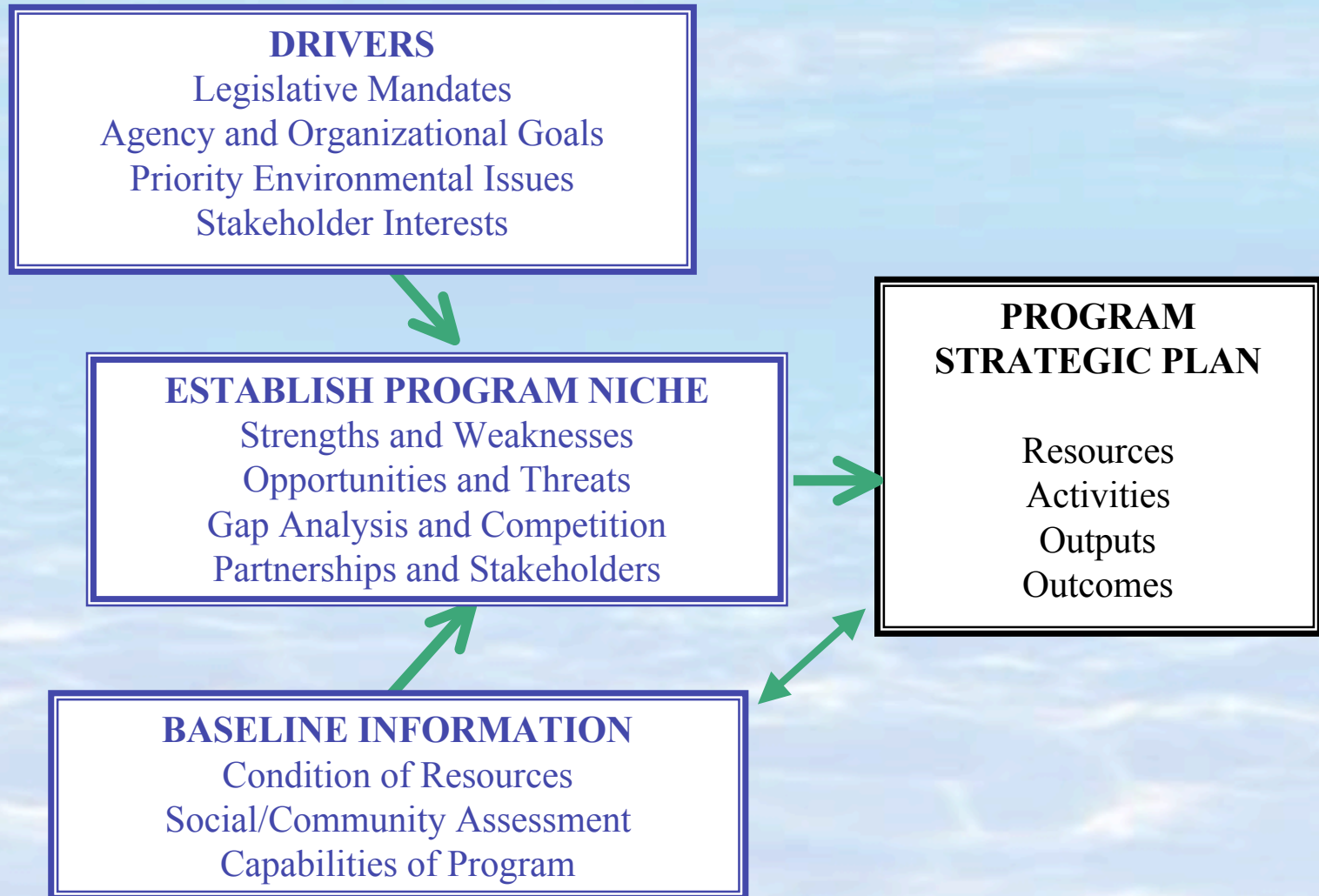
Assessment Phase

Front-End Assessment

Where are we now?



Assess



Drivers – What and who do you answer to?

- Legislative Mandates
- Local Policy
- Agency and Organizational Goals
- Priority Environmental Issues
- Public Outcry regarding sudden issues
- Stakeholder Interests
- Others?

Baseline Information

- Condition of Resources
- Social/Community Assessment
- Program Capabilities

Niche - Program's Unique Positioning

- Strengths and weaknesses
- Opportunities and threats
- Gap analysis and competition
- Partnerships and stakeholders

Strategic Planning

ASSESSMENT

- Drivers
- Baseline Information
- Establish Niche

STRATEGIC PLAN

- Resources
- Activities
- Outputs
- Outcomes

- **Biophysical**
- **Socioeconomic**
- **Governance**

Group Discussion

- Additional ideas about drivers, baseline information, and niche
- Status of site-level knowledge of drivers and baseline information
 - Aware of?
 - Monitoring? If yes, how? How often?
 - Are some of these information gaps?

Front-end Assessment

- There are complex influences to consider
- Drivers and niche guide the long-term vision of MPA sites and systems
- Baseline information informs strategic planning at both the system and site levels
- Baseline information also provides a starting point for monitoring and evaluation

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Review & next steps

